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U.S. Army Research Institute
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Research Report 1564

Unit Leader Assessments of a Joint Readiness Training Center Rotation

Tracye D. Julien and Guy L. Siebold
U.S. Army Research Institute

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June 1990

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REPORT DOCUMENTATION PAGE

Form Approved
OMB No. 0704-0188

1a. REPORT SECURITY CLASSIFICATION Unclassified			1b. RESTRICTIVE MARKINGS --	
2a. SECURITY CLASSIFICATION AUTHORITY --			3. DISTRIBUTION / AVAILABILITY OF REPORT Approved for public release; distribution is unlimited.	
2b. DECLASSIFICATION / DOWNGRADING SCHEDULE --				
4. PERFORMING ORGANIZATION REPORT NUMBER(S) ARI Research Report 1564			5. MONITORING ORGANIZATION REPORT NUMBER(S) --	
6a. NAME OF PERFORMING ORGANIZATION U.S. Army Research Institute	6b. OFFICE SYMBOL (If applicable) PERI-IL	7a. NAME OF MONITORING ORGANIZATION --		
6c. ADDRESS (City, State, and ZIP Code) 5001 Eisenhower Avenue Alexandria, VA 22333-5600		7b. ADDRESS (City, State, and ZIP Code) --		
8a. NAME OF FUNDING / SPONSORING ORGANIZATION U.S. Army Research Institute for the Behavioral and Social Sciences	8b. OFFICE SYMBOL (If applicable) PERI-I	9. PROCUREMENT INSTRUMENT IDENTIFICATION NUMBER --		
8c. ADDRESS (City, State, and ZIP Code) 5001 Eisenhower Avenue Alexandria, VA 22333-5600		10. SOURCE OF FUNDING NUMBERS		
		PROGRAM ELEMENT NO. 63007A	PROJECT NO. 794	TASK NO. 3406
		WORK UNIT ACCESSION NO. H2		
11. TITLE (Include Security Classification) Unit Leader Assessments of a Joint Readiness Training Center Rotation				
12. PERSONAL AUTHOR(S) Julien, Tracye D.; and Siebold, Guy L.				
13a. TYPE OF REPORT Interim	13b. TIME COVERED FROM 89/02 TO 89/11	14. DATE OF REPORT (Year, Month, Day) 1990, June	15. PAGE COUNT	
16. SUPPLEMENTARY NOTATION --				
17. COSATI CODES			18. SUBJECT TERMS (Continue on reverse if necessary and identify by block number)	
FIELD	GROUP	SUB-GROUP	Training, Performance (Training), Leadership, JRTC	
05	08			
19. ABSTRACT (Continue on reverse if necessary and identify by block number) For this research, leaders from a battalion that had completed a rotation through the Joint Readiness Training Center (JRTC) 3 weeks earlier were given a questionnaire and/or were interviewed. They responded that training at the JRTC was realistic and somewhat stressful and that JRTC after-action reviews were very useful. The capabilities most important for platoon leaders at the JRTC were technical and tactical proficiency, initiative, and decision making; those for company commanders were planning, decision making, and communication. Platoon cohesion correlated significantly with perceived platoon performance ($r = .40$). The leaders provided many suggestions on how to train for a JRTC rotation.				
20. DISTRIBUTION / AVAILABILITY OF ABSTRACT <input checked="" type="checkbox"/> UNCLASSIFIED/UNLIMITED <input type="checkbox"/> SAME AS RPT. <input type="checkbox"/> DTIC USERS			21. ABSTRACT SECURITY CLASSIFICATION Unclassified	
22a. NAME OF RESPONSIBLE INDIVIDUAL Guy L. Siebold			22b. TELEPHONE (Include Area Code) (202) 274-8293	22c. OFFICE SYMBOL PERI-IL

Research Report 1564

**Unit Leader Assessments of a
Joint Readiness Training Center Rotation**

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June 1990

Army Project Number
2Q263007A794

Education and Training

FOREWORD

A primary mission of the Leadership and Motivation Technical Area of the U.S. Army Research Institute for the Behavioral and Social Sciences (ARI) is to enhance small unit readiness and performance through research to improve leadership, cohesion, and motivation. The specific research described in this report is part of a larger project focusing on how leadership, cohesion, and motivation are developed at home station prior to a unit's rotation through an Army Combat Training Center and how these factors impact on unit performance at the Combat Training Center. The larger research project has been given the task title, "Determinants of Small Unit Performance."

This research report describes the results of interviews and questionnaires given to leaders in one battalion that had just returned from a rotation at the Joint Readiness Training Center (JRTC), Fort Chaffee, Arkansas. The leaders responded concerning the impact of cohesion and motivation on platoon performance, which leadership factors were most important for unit performance, and on how to train for a JRTC rotation. In addition, the leaders provided comments on how stressful and realistic they found the rotation and on how useful they found the after-action reviews given at the JRTC. This report has been written to provide feedback to the unit leaders in the battalion, to the research sponsor, and to leaders in charge of the JRTC. In addition, it is meant to be helpful to leaders of units that may rotate through the JRTC in the future.

The sponsor for the research is the Center for Army Leadership, U.S. Army Command and General Staff College, Fort Leavenworth, Kansas, which has reviewed the final version of this report (May 1989) and supports its publication. Research is conducted for the sponsor under a Memorandum of Agreement between the U.S. Army Command and General Staff College and the U.S. Army Research Institute, dated 4 May 1987, subject: "Leadership and Cohesion Research Program." In addition, an earlier version of the report was distributed in March 1989 to leaders at the JRTC and the commander of the battalion involved, among others, for use in understanding and improving matters within their domains.


EDGAR M. JOHNSON
Technical Director

UNIT LEADER ASSESSMENTS OF A JOINT READINESS TRAINING CENTER ROTATION

EXECUTIVE SUMMARY

Requirement:

The U.S. Army Research Institute for the Behavioral and Social Sciences (ARI) is conducting a major multiyear research project to examine the home station determinants of subsequent unit performance at the Combat Training Centers and to work with units rotating to the Training Centers and other Army organizations to develop ways to enhance home station training and readiness. The primary sponsors of the project are the Combined Arms Training Activity and the Center for Army Leadership, both at Fort Leavenworth, Kansas. During the preliminary phase of the project, data were collected from soldiers in one battalion rotating through the Joint Readiness Training Center (JRTC). The purpose of this research report is to document that portion of the data collected 3 weeks after the battalion had completed its rotation so that it can be distributed and integrated with similar data from succeeding rotations. In addition, those who operate and oversee the JRTC requested the U.S. Army Research Institute to relay to them any information on how rotating units perceive the training at the JRTC and how well it meets their training needs, with particular attention on the perceived realism of the training and the usefulness of the after-action reviews (AAR's). The leaders of the rotating unit from which data were collected requested that they be provided a summary of the comments and results.

Procedure:

ARI researchers went to the battalion at its home station approximately 3 weeks after the JRTC rotation. They gave questionnaires to the squad leaders, the platoon sergeant and platoon leader in each platoon, as a platoon group, in their dayroom or in a classroom setting. After these leaders completed their questionnaires, a group interview was conducted. Separate, individual interviews were conducted with each company commander, the battalion executive officer and S-3, and the brigade executive officer and S-3, in their office areas. All interviews followed a structured interview schedule. The total number of leaders interviewed, individually or in a platoon group, was 66.

Findings:

The questionnaires and interviews focused on six content areas. The first area dealt with the perceptions of the leaders on how realistic the training was at the JRTC. In general, the leaders found the training to be realistic and stressful, but not exceedingly so. JRTC was considered just somewhat more realistic and stressful than a high quality, off post FTX. Higher level leaders perceived greater realism and stress than did lower level leaders. Seen as particularly realistic were the logistics and medical evacuation aspects, the use of different uniforms for the OPFOR, and the interplay with attached and support elements.

A second area examined the usefulness of AAR's. By and large, the AAR's were seen as quite helpful, particularly by the officers. The major drawback to them was perceived to be that they interrupted the flow of action.

A third content area focused on the leadership capabilities most important for performance at the JRTC. While all major dimensions of leadership, or Leadership Performance Indicators, were seen as important, the most important for platoon leaders were judged to be "technical and tactical proficiency," "initiative," and "decision making." For company commanders, the most important indicators were judged to be "planning," "decision making," and "communication."

The fourth area dealt with the levels of motivation and cohesion. Both were seen as reasonably high during the rotation, although motivation was considered more variant, in part because the battalion was near the end of its COHORT life cycle. Cohesion in particular was assessed by the leaders as an important correlate of squad and platoon performance.

The fifth content area examined how well their home station training had prepared the soldiers for the JRTC. Most leaders felt that their training had been appropriate and good. Responses to questions in this area merged with those in the sixth area, i.e., the advice they would give to leaders of other units training for the JRTC. In general, they had conducted and recommended hard, realistic training with a concentration on the basics at squad and platoon level. They recommended training with live-fire exercises and as much fidelity as possible with the conditions found at the JRTC. Also, they suggested having a strong emphasis on leader training to understand what higher level leaders needed to know and to fill in for casualties.

Utilization of Findings:

In addition to documenting the information and findings for use in the larger project, this research report will be used in three ways: (1) to provide information to those who operate and oversee the JRTC on how realistic the leaders in the rotating unit thought the training at the JRTC was and on how useful the after-action reviews were perceived; (2) to provide to the leaders of the rotating unit a summary of their comments; and (3) to provide to leaders of other units, which will rotate through the Combat Training Centers in the future, comments that might be helpful in training their own units.

UNIT LEADER ASSESSMENTS OF A JOINT READINESS TRAINING CENTER ROTATION

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UNIT LEADER ASSESSMENTS OF A JOINT READINESS TRAINING CENTER ROTATION

INTRODUCTION

The JRTC

The Joint Readiness Training Center (JRTC) at Fort Chaffee, Arkansas is the primary combat training center for light (non-mechanized) infantry units. The JRTC provides a collective training environment in which a battalion task force operates against an experienced opposing force under partially controlled conditions within a general scenario. Unit operations are observed by an on-site cadre of observer/controllers (O/C's) who assess unit process and performance and provide training feedback to the rotating units. About ten battalion task forces go through the JRTC each year for a two-week training rotation.

Purpose

The purpose of this report is to document the comments on selected issues made by leaders from one battalion that went through a recent rotation. The report complements a prior report on the views of leaders from a different rotating battalion (Oliver & Julien, in preparation). The documentation is needed for the development of future research instruments for a wider research project on the home station determinants of unit performance at combat training centers. In addition, it is needed to provide requested feedback to those who operate and oversee the JRTC, to provide to the leaders in the rotating unit a summary of their comments, and to give leaders of other units information that might prove helpful in training their own units.

Specifically, this report documents the perceptions and comments of the leaders who trained at the JRTC concerning the following issues:

1. How realistic and stressful did the leaders find the JRTC experience to be?
2. How helpful did the leaders find the After Action Reviews?
3. What leader capabilities are considered most important? What leadership behaviors made a difference in performance at the JRTC?
4. What were the levels of motivation and cohesion at the JRTC? How much did they relate to performance?
5. How well did their home station training prepare them for training at the JRTC?

6. What advice would the leaders give to others whose units are training for the JRTC?

METHOD

Sample

The sample consisted of leaders in a light infantry battalion that had three weeks earlier completed a rotation at the JRTC. The platoon level leaders in the sample were 35 squad leaders, 12 platoon sergeants, and 11 platoon leaders. They came from nine line platoons (three platoons from each of Companies A, B, and C) and three specialty platoons (Scout, Anti-Tank, and Mortar Platoons in HHC). In addition, the sample included all 4 company commanders and 2 battalion-level leaders (one XO and one S-3) as well as 2 brigade-level leaders (one XO and one S-3) for a total sample size of 66 leaders. All respondents were male.

Instruments and Procedure

Two similar versions of a paper-and-pencil questionnaire were given to the platoon level leaders. One version was for squad leaders and referred to squads when addressing selected issues; the other version was for platoon leaders and platoon sergeants and referred to platoons when addressing selected issues. The questionnaires were administered by ARI researchers to the leaders in each platoon as a group, one platoon at a time, either in a classroom or dayroom setting. After the leaders in a platoon completed the questionnaires, the researchers conducted a group interview with the leaders, using a structured interview schedule. The ARI researchers conducted individual interviews, following a structured schedule, with each of the company commanders and staff officers, in their offices or adjoining areas.

RESULTS

1. How realistic and stressful did the leaders find the JRTC experience to be?

The training at the JRTC is meant to be as realistic as feasible (consistent with safety standards) and relatively stressful. By its nature, it cannot be as realistic and stressful as actual combat. However, those who operate and oversee the JRTC are interested in how rotating units perceive the realism and stress. For the particular rotation addressed in this report, the responses by the platoon level leaders to the questionnaire items concerning realism and stress (see Table 1, items 1-4) averaged between 3.1 to 3.5 on the scales (where 1 = low [Strongly Disagree] and 5 = high [Strongly Agree]), with a standard deviation of about 1.0. In other words, the respondents

found the training to be realistic and stressful, but not especially so. However, ratings of realism and stress from

Table 1

Questionnaire Items That Correspond to Research Topics

Topic	Item	Question
Realism	1	In my opinion, JRTC was realistic in comparison to my expectations of what actual combat would be like.
	2	JRTC was as realistic as other FTX's I have been on.
	3	In my opinion, the JRTC OPFOR was realistic in comparison to my expectations of what an enemy in actual combat would be like.
Stress	4	JRTC prepared my squad/platoon well for the stress one would expect in an actual combat situation.
Motivation	7	It really mattered to me that we did well at JRTC.
	8	I put in extra effort to prepare for JRTC.
	9	I really cared about how I performed at JRTC.
Cohesion	10	When faced with a difficult task at JRTC, other members of my squad/platoon helped out.
	11	During JRTC, the soldiers in my squad/platoon worked well together as a team.
	12	During JRTC, the members of this squad/platoon put the good of the squad/platoon ahead of their own personal needs.
AAR's	13	The after action reviews (AARs) were very useful for improving squad/platoon skills and performance during JRTC.

Table 1 (Continued)

Performance Effectiveness	14	Overall, the performance of my squad/platoon during JRTC was highly effective.
Pre-JRTC Preparation	16	The training my squad/platoon received at Home Station prepared us for performing well at JRTC.
Performance Improvement	17	The training my squad/platoon received during JRTC helped to improve its performance by the end of JRTC.
Performance	28-41	Defend, Disengage, Breach Obstacle, Perform Hasty Ambush, Perform Point Ambush, Occupy Assembly Area, Move Tactically, Reconnoiter Area, Reconnoiter Zone, Reconnoiter Route, Perform Area Ambush, Infiltrate/Exfiltrate, Occupy Observation Post/Perform Surveillance, Establish Patrol Base.

Note. Leaders responded to items 1-17 using a five point scale (1 = Strongly Disagree, 2 = Disagree, 3 = Neither Agree nor Disagree, 4 = Agree, and 5 = Strongly Agree). Leaders rated their squad/platoon performance on items 28-41 using a four point scale (A = Excellent, B = Good, C = Only Fair, and D = Poor).

respondents on this rotation were slightly higher than those reported in the parallel effort (Oliver & Julien, 1989). Platoon leaders consistently rated realism and stress about one half point higher than the platoon sergeants or squad leaders. Among the items, item 2, "JRTC was as realistic as other FTX's I have been on," received the highest average rating, about 3.5. Correlations showed that there was no relationship between the platoon level leaders' perceptions of JRTC realism and perceptions of the performance of their soldiers ($r = -.01$).

The leaders were asked to comment on the realism and stress of the JRTC. One platoon level leader said that the JRTC was not as realistic as home station, but there was more fire support. Another leader stated that the JRTC was less stressful than his soldiers thought it would be. According to him, it was a letdown and just like any other field problem. One company commander stated that the realism was good but similar to FTX's conducted at home station when MILES gear was available. He especially felt that having the OPFOR air force at the JRTC contributed to the realism. Also, the requirements for handling and replacing

casualties imposed at the JRTC added to the stress and realism. Further, he felt that having the OPFOR in different uniforms made the JRTC more exciting and realistic for the troops.

Battalion and brigade level leaders were generally positive about the realism at the JRTC. (Authors' note: remarks appearing in quotation below have been edited for conciseness and clarity; they were recorded by the interviewers based on statements made by the leaders being interviewed.) One stated that the JRTC got an "8 or 9 out of 10 on the realism scale--one of the best. The realism of the training was good for all levels; there were no train arounds; the food, water, and supplies had to actually get there." Another leader said that JRTC was an "excellent training opportunity; the closest thing to combat." A third leader stated that "overall, the JRTC was very realistic for all levels--including the platoons and troops; it was hands on experience for all parts of combat." JRTC was also seen as realistic and valuable because it was unknown terrain, you had to count on your navigation and individual skills, and because there were unknown factors, the surprise element.

The battalion and brigade leaders also pointed out a number of ways the realism could be increased, if found feasible to implement. First, the use of more realistic explosives and indirect fire would be helpful, e.g., better simulations of hand grenades and artillery. Second, upgrading the capabilities of the MILES systems could increase realism. "MILES won't shoot through cover or grass and thus affects the positioning of rifles." Similarly, the "killing" of tanks by dragons or TOWs is a problem. There was a perceived differential skill in using MILES gear between the BLUEFOR and the OPFOR. Third, more of the unknown would enhance the realism. "We knew where others had defended and where the OPFOR came from. We knew they would hit at 0600 the next morning. JRTC needs to change the scenario. The weather was the surprise." Fourth, the realism would be increased by adding a local civilian component to JRTC. "We don't focus enough on the local population and cultural differences. At JRTC we focus on area and the enemy. We don't take into account psychological effects on the enemy or the need to win over the population. There are no towns or hamlets to secure or interpersonal relationships with people in them; no consideration of destroying populations or food fields." Fifth, and finally, realism would be enhanced by lessening the "testing effect." "Leaders do what they think you want them to do (because they'll be graded on it), but leaders need to do what they would do in actual combat. What they are told to do (by the O/C's) may not make sense." One leader commented that the O/C's don't allow enough risk taking or experimenting with doctrine. It was also suggested that casualties be reassigned to new units instead of being returned to their old ones. Likewise, some leaders suggested that units shouldn't train specifically for the JRTC event but rather train for combat. It was suggested that

units should be trained up and just be dropped in somewhere, maybe JRTC, maybe somewhere else.

2. How helpful did the leaders find the After Action Reviews?

After each major mission at the JRTC, after action reviews (AAR's) were provided by the observer/controllers to the platoon level on up, in sequence. The platoon level leaders (squad leaders, platoon sergeants, and platoon leaders) generally felt that the AAR's were useful; the overall mean response to item 13, Table 1 was 3.9, with a standard deviation = 1.0. Platoon leaders rated the AAR's highest (mean = 4.5) while squad leaders rated them lowest (mean = 3.7). Two of the platoon level leaders commented that the AAR's interrupt normal functioning. One of them stated that the "AAR's slow down the flow of action--they take people out of the mind-set." One company commander stated that the O/C's were good as trainers and reacted very positively when the leaders of the rotating unit took a "train me" attitude, i.e., sought out a quality critique. In a similar vein, tapes of AAR's from prior rotations, take home packages, lessons learned material, and AAR reports written by previous rotating brigades were seen as very useful by the battalion and brigade leaders interviewed as aids in planning and preparation for a JRTC rotation. All the leaders indicated they intended to review and use these types of information from their rotation in planning future training and making adjustments to SOP's. One suggested that it would be useful to have tapes of the actual operations for their review or some type of replay via instrumentation such as available from the National Training Center.

3. What leader capabilities are considered most important? What leadership behaviors made a difference in performance at the JRTC?

Company, battalion, and brigade leaders (n = 8) were given a list of ten important leadership capabilities and asked to select the three most important for the effectiveness of both platoon leaders and company commanders at the JRTC. These capabilities, or Leadership Performance Indicators (LPI's), were: communication, planning, supervision, decision making, ethics, teaching/ counseling, technical and tactical proficiency, flexibility, soldier team development, and initiative. There were a total of 24 selections made (3 selections times 8 responding leaders) for the most important LPI's for the platoon leader position and 24 for the company commander position.

Because all ten LPI's are important, the three selected as the most important varied from respondent to respondent. No single LPI was selected as most important by all eight of the respondents. For the platoon leader position, the leader capabilities most often selected as the most important were technical and tactical proficiency (selected by 5 of the 8

respondents), initiative (selected by 4), decision making (selected by 4), communication (selected by 3), and planning (selected by 3). For the company commander position, the leader capabilities most often chosen as most important were planning (selected by 7 of the 8 respondents), decision making (selected by 5), communication (selected by 4), and technical and tactical proficiency (selected by 3).

The eight responding leaders also explained why they made their selections. For the platoon leader position, technical and tactical proficiency was seen as one of the most important capabilities "for obvious reasons." More specifically, that proficiency was seen as feeding into the other LPI's such as decision making. Without proficiency, the platoon leader would be "forced into being reactive rather than proactive." Further, one respondent suggested that soldiers look to such proficiency as the first factor on which they assess their platoon leader; "he must be squared away or he can't teach or lead his soldiers. Failure here will get friendly soldiers killed."

Decision making was seen as one of the most important LPI's for the platoon leader position because "if you can't make decisions and modify as required, you can't lead." The "unit must have a clear idea of what the leader wants; (it) is then able to perform to potential; energy is focused." Several respondents commented on the need for the platoon leader to have high decision making capability, to be decisive, in decentralized operations; "decisions create movement." They also commented upon the need to train subordinates in decision making, to allow them to make decisions when appropriate.

Initiative was also seen as one of the most important LPI's for the platoon leader position. The platoon leader must "deal with change, deal with options." "We need guys who want to do something, even if it is wrong." "Communication is so fragile that without initiative and a knowledge of the commander's intent (two levels up) the mission would rarely be successful." Our "most lethal weapon (is a platoon leader or squad leader) who can navigate and understand intent."

For the most important leadership capabilities for the company commander position, the eight respondents provided similar explanations. Seven of these responding leaders felt that planning was one of the most important of the LPI's for company commanders because planning is one of the key "roles of the officer--anticipating future operations; allowing time for subordinate leader plans, rehearsals, and inspections; and (keeping the unit) ahead versus being reactive." The company commander "is the first level at which you have to consider long-range; he needs to plan moves that go out in time and what they will lead to in the long run." Further, "a poor plan not thought out will fail and (needlessly) cause soldiers to die."

Decision making was selected by five of the eight leaders responding as one of the most important LPI's for the company commander position because "often the first decision has to be the right decision." The company commander "must make decisions and suffer the consequences later." "This is a high level task; (the company commander must) identify something new, different that needs to be taken into account; he must handle it--adjust, wait, seek new resources." Many respondents repeated the comments on decision making they made in explaining its importance for the platoon leader position, and, as with planning, decision making was seen as "it's our business."

The third most often selected LPI for company commanders was communication. Since subordinate leaders "execute the commander's mission and intent," "the commander must express his desires clearly, to the point, and quickly." "If the company commander can't quickly plan and communicate, his company will be ineffective." And again, communication was seen as part of "our business"; it "makes things happen."

The platoon level leaders (squad leaders, platoon sergeants, and platoon leaders) were asked in the group interviews "What were the leadership behaviors that you felt made a difference in your platoon's performance at JRTC?" These leaders identified a large number of behaviors and actions, all of which could be categorized generally under one or more of the Leadership Performance Indicators. These behaviors (re-phrased as positive suggestions and categorized by primary LPI) were as follows:

Communication. Keep your cool--don't yell and scream--find out what the problem is. Don't badmouth each other under stress or in front of the troops. Keep a positive attitude--explain missions and why you are doing things to the troops; don't let them feel everything is all screwed up. Try to verify and insure the accuracy of information.

Planning. Don't change your SOP's just before and during JRTC. Plan to get the food, water, etc. needed. Expect vehicles to get stuck in the mud, and plan to get them out. Expect not to have enough time to plan. Don't overestimate how fast the platoon can move or how far without enemy contact.

Supervision. Don't get too sympathetic, too close to your men (e.g., letting them doze off or get away with things they shouldn't). Emphasize that only high (fair) standards will be accepted. Make sure your area is secure, that someone is always awake. Make sure--watch--that your soldiers actually take care of their feet, change their socks. Share the work among all ranks. Rotate carrying the heavy stuff. Emphasize rest plans. Give people the maximum amount of sleep possible. Try to get extra things (e.g., food or warming tents) for the soldiers. Lead by example.

Decision making. Immediately re-establish the chain of command when a leader "dies." Delegate--put trust in your NCO's. Focus on executing the plan, not just killing the enemy. Take charge.

Technical and tactical proficiency. Know Soviet doctrine. Know your job.

Flexibility. Keep flexible. Expect change.

Soldier/team development. Stress builds as the exercise progresses--NCO's can be supportive--hear them out. Don't feel you have to know everything or that you are "lowered" if you listen to the lower ranks. Get lower level input and encourage lower level initiative. Drill into your PFC's and corporals (or Spec 4's) that they are in the chain of command so that they will be ready to take over and show initiative if needed. Keep a balance between doing what the "uppers" want and satisfying the ideas of the NCO's on how the platoon should run. Give your soldiers a pat on the back, rewards in the field.

Initiative. Don't accept orders blindly--speak up. Keep going despite bad odds.

The above responses by the platoon level leaders are based, of course, on their experience on a specific rotation and their level of leadership skill and ability. Presumably, responses from platoon level leaders in other battalions would be relatively similar.

4. What were the levels of motivation and cohesion at the JRTC? How much did they relate to performance?

Generally, leaders felt that the levels of motivation and cohesion in their units during JRTC were high. Table 1 shows the questionnaire items which the platoon level leaders used to indicate their assessments of their own motivation (items 7-9) and the cohesion of their squad or platoon (items 10-12). The mean ratings of the squad leaders, platoon sergeants, and platoon leaders on their own motivation and on the cohesion in their squad or platoon were all about 4.4 (1 = low [Strongly Disagree], 5 = high [Strongly Agree]), with a standard deviation of about .6. In other words, almost all platoon level leaders agreed or strongly agreed that their motivation and the cohesion in their squads or platoons were high during the JRTC rotation.

The 58 platoon level leaders were asked to indicate how effective their squad or platoon performed on several mission tasks at the JRTC (questionnaire items 28-41), using a scale going from A = Excellent to D = Poor. During analysis the responses were converted to numbers and reverse ordered so that the ratings went from 1 = Poor to 4 = Excellent. The average

ratings on the performance of these mission tasks were correlated with the the ratings the leaders gave on motivation and cohesion. From the viewpoint of the platoon level leaders, their ratings of the level of their own motivation correlated only somewhat with their ratings of squad or platoon performance ($r = .23$; $p < .08$). Their ratings of their own motivation correlated more highly with their perceptions of the level of cohesion in their squad or platoon, at a statistically significant level ($r = .32$; $p < .02$). Most importantly, the ratings by the platoon level leaders on the level of cohesion in their squad or platoon correlated even more highly, and at a higher level of statistical significance, with the leaders' assessments of the typical performance of their squad or platoon ($r = .40$; $p < .00$). In other words, based on the overall assessments from the platoon level leaders, squad and platoon cohesion was clearly linked to JRTC performance, while their own motivation was much less so. This cohesion-performance link in light infantry platoons has been a consistent research finding (e.g., Siebold & Kelly, 1988).

After the leaders in a platoon completed questionnaires, they were asked, in a group interview, "Did the motivation of your platoon make a difference at JRTC in terms of the platoon's performance?" The responses of the platoon level leaders were mixed. "They did a good job, but there was a lack of zest." "It would have been a factor earlier in the (COHORT) life cycle." "In two months the battalion deactivates. This distracted performance. People were concerned with getting the job done and going home to check out." "It's like telling a guy who's fired to accomplish a job." "But, many soldiers had pride and wanted to go out on top." "This platoon is competitive. They want to be No. 1. By the fourth day at JRTC, motivation and morale really dropped." "The discipline was real high in this group." "They were highly motivated to stay up with their friends and leaders; it goes hand in hand with cohesion." "There was pride in unit and platoon; they were motivated to remain the best and show outsiders they could perform well at JRTC." "The perceptions of enemy capabilities and weaknesses helped greatly to motivate them." "After the first OPFOR contact, they gained confidence that the OPFOR wasn't undefeatable and that they could win." "There's pride in the unit. They don't just walk around and say we're good. They were aware that others were looking on and that they would comment. They wanted to look good." "We're active. In offense, we're the best. When we had to sit and hide, it strained the platoon because we couldn't move." "In a passive, subdued situation, they're like a caged animal." "One wimp realized he needed to participate when others took over for him." "They carried him along and got his motivation up, so that he got back with it." "During the deep freeze, people wanted to stay in their sleeping bags and didn't volunteer." "Leaders need to demonstrate more willingness." "There were a few instances where fatigue and cold took a toll. The job falls on the leaders to be conditioned to overcome it." "Motivation is dependent on

the leaders' spirits and example." "The troops are more motivated at the start when everything is new and they have a long way to go." "The constant changes, sprung without warning, dropped motivation; people just go through the motions." "You can only be so flexible. Once you get action, the motivation gets high." "A discipline problem is a motivation problem. One troop was so bad the brigade had to get involved, to chapter him out. He got away with everything; the other troops saw it, and they got demotivated by comparison." "Motivation wasn't that big a problem; can't stay highly motivated for 11 days, and the changes caused disgust. The soldiers were motivated despite the weather, drove on, and did what was needed to be done." "Their motivation comes from knowing their importance, that a lot of trust was put in them." "The troops were let down because JRTC was not as stressful as it had been built up." "The soldiers were very motivated. Many had only two months to go; this didn't hold them back. They wanted to show what they could do."

Similarly, the platoon level leaders were asked "Did cohesion among soldiers in your platoon make a difference at JRTC in terms of the platoon's performance?" The leaders felt that cohesion made a big difference. "They pay attention to each other; everyone knows everyone else's job." "You depend on a small group; everybody's input is valued." "Scouts' cohesion somewhat sets them apart; the unit has less interference from upper echelons; you can't be selfish and accomplish the mission." "Because of COHORT and being together for three years, we know and care about one another; we help one another out." "It's when we're tired that there are arguments." "Cohesion made a difference. Example is evacuation. Squad members were ready to move out and do it. Normally, they resent doing this." "Cohesion is trust; it lets you have the opportunity to rest; you can depend that others are doing their jobs well." "Squad members will discipline each other; this is necessary for survival. Soldiers may not like someone (or they may be "newbies"). but they'll defend him from outsiders." "The cohesion in the platoon was high. Yet when cross-attached, given the competitiveness among units, there is a let down when the assignments are given to the organic platoon when we're better." "Everyone knows each other's strengths." "With a new guy, you have to give precise instructions and not assume anything." "Once a mission was given, we all pulled together to do it, shared the load." "Cohesion makes things run a lot smoother." "We had three casualties in one night; the other squad helped to carry the stuff of the short squad; the weapons were switched around." "The strongest bonding was between the COHORT originals. Bonding was OK with the company; bonding with the battalion was limited." "Bonding is from the bottom up; it's strongest for people you work with the closest; Vietnam bonding was a lot stronger; you need blood for bonding." "Everyone didn't have sleeping bags and poncho liners; they doubled up; shared meals and water too when they were short." "The soldiers

kept giving each other briefbacks so that someone else could take over; they kept anticipating what would occur." "There was a lot of teamwork; we didn't have to do the checking--it would get done." "Peer pressure created positive pride." "Cohesion gives you flexibility at the lower levels." "The soldiers kept each other's spirits up, shared each other's loads, helped to keep each other going."

5. How well did their home station training prepare them for training at the JRTC?

On the questionnaire, most of the platoon level leaders gave either the agree or strongly agree response to item 16 (Table 1), "The training my squad/platoon received at Home Station prepared us for performing well at JRTC." The mean response of the squad leaders was 4.1 (on the scale where 1 = low and 5 = high); the mean response of the platoon sergeants was 4.4 while that of the platoon leaders was 4.6. Altogether, the mean response of the platoon level leaders was 4.3 with a standard deviation of .7.

In comparison, the mean response of the platoon level leaders to item 17 ("The training my squad/platoon received during JRTC helped to improve its performance by the end of JRTC.") was 3.9 with a standard deviation of 1.0. Also, the mean response to item 14 ("Overall, the performance of my squad/platoon during JRTC was highly effective.") was 4.2 with a standard deviation of .7. In other words, the platoon level leaders viewed very positively their homestation training and the performance of their squads and platoons at the JRTC. They also viewed their training at the JRTC as positive in terms of improving their performance. The platoon leaders' assessments were on each item somewhat higher than the platoon sergeants' assessments which, in turn, were somewhat higher than the assessments of the squad leaders. A larger sample size would be needed to determine if these consistent differences in ratings by the platoon leaders, platoon sergeants, and squad leaders were significant.

In the group interviews following the questionnaires, the platoon level leaders were asked "Knowing what you now know about your platoon's performance at the JRTC, what were some of the things that happened before the rotation that led to this performance?" Their comments were varied. "We didn't train just for JRTC." "We were trained hard (at home station); it makes JRTC not seem very hard." "Our normal training is good, like ranger training (but it is too tough to have as a career)." "Squads are the key. Our's are probably the best trained. As you went up the echelons, mission performance suffered, because we didn't train as much at the company and battalion levels." "Most people knew each other and what is expected (COHORT)." On the negative side, one platoon group said, "There was too much competition in the company." "It started out as an experiment

for healthy competition that got out of control." "There was a lack of unity in the company as a whole." Another platoon group said they "could have trained better on company night movements, navigation, and linking up." A third group felt that there were "too many inspections and changes to the packing list before leaving for the JRTC; their soldiers were unhappy because of all the changes, including SOP's, after two and one half years in the unit." One set of platoon level leaders felt they performed well at the JRTC because they had a very good dress rehearsal at an FTX off their post. Other homestation training factors that helped performance at the JRTC included "good physical training," "an emphasis on indirect fire," "realistic field training at the squad and platoon levels," "MILES and live fire training," "having an OPFOR during post training," "training on med-evac at home station," "knowing which missions to focus on for JRTC," "constant homestation training," "having hard field problems to work on at home station," "stressing building confidence, having fun, and developing a positive attitude," "emphasizing training in troop leading procedures at all leader levels," "cross-training in anticipation of casualties and teaching subordinates to take over for their leaders," and "developing good channels of communication in the whole platoon." Several leaders mentioned that the experience their unit had serving as part of the JRTC OPFOR early in their COHORT cycle was also very valuable training for their own rotation at the JRTC.

6. What advice would the leaders give to others whose units are training for the JRTC?

The advice the leaders would give to others must be put in the context of how well the leaders themselves thought their units performed at the JRTC and what they would have done differently in preparing their units, based on the experience of their rotation. Most platoon level leaders felt that their squads and platoons performed well. For example, as noted above, the overall mean response by the platoon level leaders to item 14 ("Overall, the performance of my squad/platoon during JRTC was highly effective.") was about 4.2 on the 5 point scale, with a standard deviation of around .7. Similarly, when indicating how effectively their squad or platoon performed specific JRTC tasks (questionnaire items 28-41), their typical rating was "good" on the 4 point scale ("poor", "only fair", "good", "excellent"). The leaders rated their performance on tasks dealing with movement, reconnoiter, and attack more highly than they rated their performance on tasks dealing with defense or disengagement.

In the interviews following the questionnaires, the platoon level leaders also responded to the question, "How do you assess the overall performance of your platoon during JRTC?" The leaders indicated that generally their platoons did well. "We probably didn't get a go on each standard, but the platoon did well overall." "The whole task force performed more tasks well

than any unit earlier." "Pretty good compared to the rest of the company." "Good overall, but the individual skills and initiative were weak." "Did better at platoon level than at company or higher; (we're) better coordinated." "The platoon did well at the individual level; any problems had to do with resupply and medivac--problems above the company level." "The defense was not so good in terms of planning, but the soldiers were ready." "We worked well together; sacrificed to do the job."

In addition, the platoon level leaders were asked "Knowing what you now know about your platoon's performance at JRTC and how you trained for the rotation, what do you think should have been done differently during your home station train-up?" The platoon level leaders had a number of suggestions; some suggestions appeared contradictory but that may be the result of different training emphases among the units. "More emphasis on levels other than squad." "Stick to (emphasizing) squad level training." "More training on working with other platoons." "Slowdown. We get so many taskings that we're off to something else before we complete (training on) one thing." "You should not focus on the event." "We focused on it (JRTC) too much. We felt that there was nothing else." "Casualty evacuation and resupply should have been prepared for better." "Practice more realistic evacuation and replacement of casualties; this forces a whole chain of events, such as retaining the (evacuated) soldier's weapons." "Put junior leaders in positions above." "Change the style of leadership so that squad leaders are allowed to do their job." "Train night movements/link ups better." "Train to standard, not to the event, with good SOP's that work anywhere." "Write SOP on convoy training and security." "Need SOP for reconnaissance security and for hiding." "More training in reconnaissance." "Get organized beforehand, e.g., packing lists for deployment, so everyone knows what to expect." "Stress support preparation at higher levels, e.g., whether and how they would get artillery support." "Refine movement of teams after they get hit (contact enemy)." "More rehearsals; we took some skills for granted, which caused initial problems." "The training was just right, but need more weapons available for training."

The platoon level leader comments about what they would have done differently flowed into their responses to the question, "Knowing what you now know about your platoon's performance at JRTC and how you trained for that rotation, what advice would you give leaders who are training for JRTC?" Their advice covered a range of topics. "Train to standards." "Don't get panicked about JRTC; JRTC is just a larger exercise." "Continue with your normal schedule; don't in the last two weeks bring in new training just to get ready for JRTC." "Be concerned with the overall mission; don't worry about whether some details in any one squad are perfect." "Don't get uptight about JRTC;

concentrate on practicing/accomplishing your own platoon mission." "Leaders shouldn't blow up, let their tempers get out of control over something silly." "Be proactive--don't sit in a defensive position and wait." "Work more on things like contingency plans." "Prepare lower leaders to take charge of the next higher jobs." "Rehearse the collective tasks, including control bases, commo, and link up." "Insure every man knows what is going on; the lowest private must know that he can't just tag along." "Make assessments of leadership, and remove (improve on) the weaknesses." "Train at team and squad level." "Rely on the squad leaders to train and implement; use your platoon sergeant." "Don't let higher ups micro-manage you, because that kills all the initiative." "Keep everything dispersed down to squad level; mass people only as a last resort." "Carry as light a load as possible; leave the extra stuff in reserve (including the weapons of casualties)." "Plan resupply before the time (you need it)." "Test out your SOP's (before JRTC) and learn from them." "Raise standards beyond what's expected." "Train to the lowest levels; expect them to do their jobs." "Get fire support down to a science." "Our problems weren't the tactics; rather, they were in supplies, logistics; this needs to be played tactically, not administratively." "Incorporate good AAR techniques; get good feedback from the squad members and leaders; train squad leaders to give AAR's; get the soldier involved." "Conduct continual hard training, not just real hard training at the last minute." "Train for combat, not JRTC." "Go to the basics; keep it simple; don't try to be fancy in OP orders." "Stay in sync; have a schedule that focuses on your unit; don't make last minute changes." "Train at home with realistic procedures, such as for handling casualties; play that people die, need treatment."

The company commanders interviewed responded to the question, "Knowing what you now know about your company's performance during JRTC and how you trained for that rotation, what would you have done differently during your home station train-up period?" What they would have done differently, of course, must be put in the context of what the leaders felt they did right. One company commander felt that a good thing they did was that, about six months before the JRTC rotation, they "took all training requirements and looked at them based on their METL and missions; looked at their strengths and weaknesses (using a prior external evaluation by brigade and division); and prepared a training plan for the next six months."

On the other hand, the company commanders noted several things they would have done differently. "The company commander should spend more time with all his leaders; there should be more leader training for troop leading procedures, preparing and planning for combat. Also we should have operated more with our air mobile assets to see how much we could depend on them." "It was a company commander's war; we never saw the battalion or brigade commanders; (we should have had more) company level

operations in training. We should have had more drills where the lower level leaders take over. The company SOP's need to be prepared and rehearsed. You need to practice more cross-attachments of squads and platoons. Also we should have practiced more at making time for briefbacks and not let briefbacks be the same as rehearsals." Another company commander thought they should have "concentrated more on basic blocking and tackling--squad drills, platoon drills, interlocking of fire in defense, etc. (there was a decay in skills) as well as synchronization among the platoons, with company, with the combat engineers, and with fire support." The HHC company commander also felt they should have "worked more on deployment, to get the deployment systems in place (e.g., load plan, packing list)."

The advice the company commanders gave (in response to the question, "Knowing what you now know about JRTC, what advice would you give a company commander whose units are training for JRTC?") follows from what they would have done differently during train-up. One theme in their advice was to "continue their effort to train junior leaders, due to the casualties at JRTC; they should be trained to look at objectives and avenues of approach as if they were the commander (e.g., here's a good spot for a breach, for an assault) and to know the commander's intent." "Conduct map training exercises." One company commander's advice was to "approach JRTC as a means to improve combat performance, as a training and learning event; don't approach it as a test. Plan for things to go wrong; build simplicity and flexibility in plans; plan for loss of leaders. Know your doctrine; it clarifies your intent and words; pass it on to platoon leaders and platoon sergeants."

The battalion and brigade leaders who were interviewed also provided comments to the questions ("Knowing what you now know about your battalion's performance during JRTC and how you trained for that rotation, what would you have done differently during your home station train-up period?" and "Knowing what you now know about JRTC, what advice would you give a battalion commander whose units are training for JRTC?"). They felt that "in their training they did a lot of things right, such as conducting hard, realistic training and incorporating live-fire exercises (when they could), which built soldier confidence and cohesion." They emphasized squad and platoon level training, which was seen as the most important level of training. However, in terms of what they would have done differently, the leaders would have liked "to increase the use of MILES gear in training" and added "more training on (the handling of) mass casualties over a long period, on a long FTX" (despite the recognized tradeoff of limiting the training of the leaders and soldiers who were acting as casualties). In addition, it was suggested that there should have been more "staff planning exercises between brigade and battalion; there were disconnects between what brigade wanted us to do and what we did do; there wasn't a common

culture between the two; there were different uses of the same terms" (e.g., whether "attack objective X" focused on a piece of ground or the enemy forces). "If we had briefed back on how we would carry out the mission, they would know how we interpreted the mission." It was suggested that home station exercises include a "stressful environment for the battalion staff, in which they would have to anticipate and work through problems" over an extended time; typical difficulties that occur over time were seen as "stress showed up about the third day," "lack of sleep plan discipline," "OPORDER details got worse over time; they weren't standardized in content or form," "what the brigade said versus what they wrote in orders," "not keeping good logs and commo, especially during change of shifts," and "micro-management." One leader suggested that in training and at the JRTC they should have had liaison officers "from bottom up, left to right." Another suggested that in training they should have "increased emphasis on sustainment, logistics, CSS actions; after 36 hours, we couldn't medically evacuate, resupply, etc.; we should have done more emphasis on S1 and S4, not just tactics."

The advice these battalion and brigade leaders would give to a battalion commander whose units are training for the JRTC follows a similar vein to what they would have done differently. "Know the rules of engagement; conduct harsh AAR's; view AAR tapes from other units." "The key to success is squads with a solid understanding of fundamental operations; command and control must be stressed at the platoon and company levels." "There are lots of logistic issues; you need to understand the time lag (pipeline) of logistics; (you need to learn how to work with) aviation assets and staff." Try to train with other division elements (brigade, support, artillery, etc.) under a "focused agenda; have an overall division deception plan." "In training, pay attention to realism, cohesion, and details; utilize MILES and live-fire training." "Focus on the lowest level possible--the individual and fire team. Trust and make the smallest guy responsible for mission completion. Allow squads to do their skills and supervise them." Teach them to coordinate with higher levels.

In conjunction with the advice provided by the company, battalion, and brigade leaders, it is appropriate to note their comments on what made some platoons perform more successfully than other platoons at the JRTC. Their rather uniform responses suggest that it was the maturity, initiative, and discipline of the squad leaders, platoon sergeants, and platoon leaders who had set high standards of training for their platoons and worked with them over time that resulted in better platoon performance. In addition to the technical and tactical skills, the positive leadership styles, and communication skills of these platoon level leaders, platoon cohesion and motivation and the use of live-fire training were also mentioned as factors accounting for more successful platoon performance.

DISCUSSION

The JRTC Training Environment

While the purpose of this research report is to document the perceptions and comments of the leaders on the specific issues listed earlier, it is also important to highlight some themes and areas of consensus which appear in many of the leaders' responses to the questions. One theme concerns the JRTC training environment. To the extent that the leaders felt they had a good physical training program and hard, realistic field training, they were not awed by the environment at the JRTC. Rather, they felt their major challenges were organizational (planning, communication, logistics, med-evac, and working with attached elements). Consequently, those handling the organizational challenges appeared to benefit the most from the JRTC rotation. Likewise, platoon leaders and above thus felt that the training at the JRTC was more realistic than did leaders at lower levels. There was general agreement that the stress at the JRTC was within the bounds of that experienced at home station and that the realism was somewhat greater than that at FTX's during the train-up period, primarily because of the greater resources and attention given to realism at the JRTC and the extended length of the rotation.

Since the questions on realism ask the respondents to compare the JRTC to their expectations about combat and an actual enemy or to their experiences on other FTX's, the interpretation of the responses must consider whether these expectations and experiences are reasonably uniform throughout the sample of leaders. It is the assumption of the authors that these leaders from the same battalion had similar expectations and experiences. However, no information was obtained to verify the similarity. To the extent that the expectations and experiences were not similar, and to the extent that the leaders had different experiences at the JRTC, one must be cautious about drawing firm conclusions from the responses and comments of the leaders on the issue of realism and on the other issues dealt with in this note. Thus, the authors have focused more on documenting the leader assessments and comments than on analyzing or summarizing them. They are best used in comparison with responses from leaders in other rotating units and as a source of ideas and issues for further consideration.

After Action Reviews

Another major theme centered on AAR's. The rotating unit appeared to take good advantage of AAR's from prior rotations. The AAR's provided during the JRTC training itself were also seen as very useful, although problematic to the extent that they seemed to break up the flow of the exercise. (AAR's were given after completion of major missions and were interpreted as

causing the "downtime" before the next major mission was started.) While O/C's typically focused on a few key points in the AAR's, they covered performance in the areas of planning, preparation, and execution. Since the AAR's dealt heavily with the actions of platoon leaders and above, it is not surprising that the platoon leaders found them more useful than did the squad leaders. The success of each AAR appeared to depend upon an interaction between the tone of the O/C presentation and the openness of those receiving the presentation to listen to the O/C comments. It is perhaps desirable that part of the home station training in preparation for the JRTC should include a greater focus on how to take maximum advantage of the AAR's during the rotation, to enhance the learning effect.

Leadership

A third theme emerged around the area of leadership. It seems clear that the leaders felt that the most important thing they should do at the JRTC to enhance unit performance was what they were trained to do, their job: planning, decision making, supervising, communicating, and acting with initiative. The importance of the major leader capabilities changed in emphasis with level of leader. The capability rated as most key for platoon leaders was tactical and technical proficiency, while that most key for company commanders was planning. The responses of the leaders were, in a sense, right out of the textbooks on leadership and, at the same time, an apparent validation of them. The research design did not allow for an examination of whether the leaders were using the framework of leadership they were taught to interpret their experience at the JRTC or whether their independent experience at the JRTC confirmed that framework. In any case, the leader comments also suggest that there was some concern about the clarity of the role relationships between leaders above, below, and lateral to each other and about the need to train subordinate leaders in the perspectives of their superiors in the event that the superior becomes a casualty.

Cohesion and Motivation

Another theme was about cohesion and motivation. Both were seen as important and feeding into one another. However, the leaders indicated that cohesion was a more powerful determinant of actual unit performance. Cohesion made things run more smoothly and carried the soldiers through the tough parts of the rotation. Descriptions of the level of motivation were mixed. In part this appeared due to the battalion being near the end of its COHORT life cycle, the soldiers feeling letdown when the JRTC was perceived as not as difficult as expected, and the challenges being seen as more organizational than force on force. What appeared as potentially problematic was the balance of cohesion, of cooperation and competition, between a subordinate element and its wider superordinate group or between two attached groups.

Lack of perfection in this area may be compounded by the apparent tendency towards external attribution of fault, i.e., the perception that successes are due to the skill and actions of the subordinate element and that failures and mistakes are due to the shortcomings of superordinate or lateral (or attached) groups. Likewise, perceptions of success appear based on relative performance in comparison with other elements in the wider superordinate group or with groups from earlier rotations rather than in comparison to a standard. It may be desirable in home station training to provide elements with greater experience working in an attached status and with more opportunities for soldiers to see directly the value of mutual support from groups working in concert. Rigorous AAR's could be used to identify and suggest remedies for any disconnects between groups and to clarify standards.

Home Station Training

A fifth theme concerned the optimal home station training in preparation for a JRTC rotation. Opinions varied. Some leaders felt that a unit should train for combat, to standards, and not focus so intently on the JRTC. Other leaders seemed to feel that training for the JRTC was the optimal way to train for combat, that the rotation pulled things together in a realistic way. In any case, there was some consensus that the best way to train for the JRTC was to maintain at home station a pattern of training with as much fidelity to the conditions at the JRTC as possible. Such training would include, whenever possible, the use of MILES equipment, training with attached elements (aviation, engineers, artillery), full simulation of med-evac and logistic challenges, training against an OPFOR, and extending FTX's over long time periods. A strong physical training program would also seem supportive. The training would focus on the basics at the squad and platoon level, incorporate company and battalion level exercises, have parallel exercises for the battalion and brigade staffs, allow for the testing and perfection of SOP's and general procedures, and stress simplicity, flexibility, and leader development. The problem, of course, is that no unit has unlimited time or training resources, most standards are at least partially subjective, personnel turbulence occurs, "stuff" happens, and it's not at all clear where to draw the lines or make the tradeoffs. In short, military training is an art, not a science, and it takes all the skill and experience of leaders at all levels to do it right.

The research described in this report was a preliminary effort aimed in part at the development of research instruments and methods. It was the start of a larger, multi-year effort to examine the home station determinants of small unit performance at the combat training centers and subsequently to work with rotating units and other Army organizations to develop ways to enhance home station training and readiness. Among the

determinants that will be examined are leadership, cohesion, motivation, training resources, and training management. During the course of the larger effort, it is expected that additional information will be generated and improvements tried to address further some of the questions and problems described above.

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